



MAERKI BAUMANN & CO. AG

PRIVATBANK

MEDIA RELEASE

Maerki Baumann & Co. AG delivered very good annual results for 2020 despite the coronavirus crisis and was awarded “Best Swiss Private Bank 2021” by the business magazine “Bilanz”.



Zurich, 30 April 2021 – Last year was dominated by the coronavirus pandemic, which initially took a heavy toll on the financial markets. Despite this turbulence, Maerki Baumann looks back on a year of very positive business development: net profit amounted to CHF 3.8 million in 2020, while at the end of the year assets under management stood at CHF 8.6 billion and the capital base was further strengthened, as reflected in a Tier 1 ratio of 24.2%. Thanks to its “defensive growth strategy”, Maerki Baumann was well positioned on the investment side at all times. The success of this strategy is also reflected in this year’s rating of private banks performed by the business magazine “Bilanz”, in which our family-owned company was named “Best Swiss Private Bank 2021”.

Despite the coronavirus crisis, Maerki Baumann recorded very positive business development in 2020: the annual result significantly exceeded that of 2019 – after adjustment for an exceptional revenue item in that year. The future-oriented business model, the stability of the shareholder base – firmly anchored by the Syz family – and the dedication of the bank’s employees all contributed to this result. The bank’s investment in its digital infrastructure paid off in a year dominated by work from home and the coronavirus. The backdrop of the pandemic also provided a fertile ground for the progress of the digitization of the business model. For example, the bank introduced video identification for new clients and launched a new mobile banking app. Thus, many banking services can now be used via electronic channels, and stock market orders can be placed in both fiat currencies and cryptocurrencies. Dr Stephan A. Zwahlen, CEO of Maerki Baumann: “The coronavirus crisis proved an “acid test” for the digitisation of our business model, but it has also demonstrated the importance of social contact. It has shown us how robust our business model is with combining personal trust and digital innovation.”

In the current year, Maerki Baumann is focusing firmly on the requirements of the future. This includes a systematic integration of sustainability aspects in the investment process. Similarly, the bank’s spectrum of crypto services expands further to offer more environmentally friendly proof of stake protocols. Maerki Baumann is more convinced than ever that digital assets are becoming an integral part in the world of professional investment advice and asset management. The bank is also planning to increase its business with corporate clients active in the blockchain industry. In addition, Maerki Baumann is continuing its efforts to seize growth opportunities in Germany, its most important market outside Switzerland. Finally, the private bank is planning to supplement its offering with family office services and the “private equity” asset class.



Best Swiss Private Bank 2021

Once again, this year, the business magazine “Bilanz” carried out its much-regarded assessment of private banks, which involved tracking a genuine private client’s search for a suitable bank. Maerki Baumann was invited – along with 93 other institutions – to elaborate an investment solution based on a comprehensive request. This year, the jury – consisting of several specialists – evaluated the following dimensions: interaction between client advisor and client, completeness of the investment solution, transparency, costs, risk disclosure, and portfolio structure. The winners were then selected in a final competitive round conducted via digital channels.

CEO Dr Stephan A. Zwahlen: “The fact that we were once again ranked the top private bank is testimony to our exceptional performance not just during the last year but over the long term as well. This success reflects the high quality and the continuity of the support we provide to clients.” Reinhard Rutz, the Head of Private Banking Switzerland and the responsible client advisor, shares this view: “Thanks to our uniform and binding advisory structure, we can identify individual needs, wishes and investment objectives even better and explore these optimally. This enables us to offer our clients an exceptional experience – one that sets us apart from our competitors.”

As a family-owned company, Maerki Baumann promotes independence and high security. The private bank offers its clients individual investment solutions that are fully tailored to their needs. Konstantinos Ntefeloudis, Head of Investment Management, confirms this: “Investment decisions are implemented rigorously and consistently, based on a systematic, binding and transparent selection process that also includes disciplined risk management. The focus is on high-quality companies with sustainable profitability and stable growth – i.e. defensive growth stocks.”

Maerki Baumann & Co. AG – Private Bank

Founded in 1932, the Zurich-based private bank Maerki Baumann & Co. AG focuses on its core competencies of investment advisory services and asset management, as well as providing services for independent asset managers. A traditional bank, which is open to modern technologies, is an unlisted family-owned company that takes a long-term view and offers its services from Switzerland only. Its investment philosophy based on independence, security and transparency is reflected in its very solid capital base and in the bank’s transparent performance. With its modular investment approach and its crypto offering, the private bank underlines its aim of combining the traditional with the new. Maerki Baumann has assets under management of around CHF 9 billion, of which more than 80% originated in Switzerland and about 10% in Germany.

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